



Delegating

About this Topic: Delegating



Topic Mentor

Thomas L. Brown

Thomas L. Brown is the author of over 400 published articles on managerial leadership. Tom wrote the first online book on leadership: *The Anatomy Of Fire: Sparking A New Spirit Of Enterprise*, which explores the look and feel of leadership in the 21st century. Tom has written for many publications, including *IndustryWeek*, *Harvard Management Update*, the *Financial Times*, and *The Wall Street Journal*, and has presented to dozens of major corporations.

Topic Source Notes

Learn

Susan Wilson. *Goal Setting*. New York: AMACOM, 1994.

Kate Keenan. *The Management Guide to Delegating*. Horsham, West Sussex: Ravette Publishing, 1996.

Steps

Stephanie Winston. *The Organized Executive: A Program for Productivity*. New York: Warner Books, 1994.

Tools

Robert B. Maddux. *Delegating for Results*. Menlo Park, CA: Crisp Publishers, 1990.

Stephanie Winston. *The Organized Executive: A Program for Productivity*. New York: Warner Books, 1994.

What Would You Do?

What would you do?

Travis receives an e-mail saying that his group has won the key Jardin Estates development deal. Travis cannot think of anyone in his group with time to run the project, and he certainly does not have time to handle it himself. After a brief meeting about the group's workload, Jill pops into Travis's office, smiling and volunteering to take charge of the Jardin Estates project. Travis is skeptical. She is bright and enthusiastic, but Jill has only two years of experience. Travis does not want to see Jill—or his group—fail, especially with this bread and butter client. Should he risk handing the job over to Jill? Or is there some other solution?

What would you do?

The first thing Travis should do is evaluate the work involved and determine what skills are needed for the project. If Jill has the necessary skills, Travis might want to delegate the project to her and work closely with her to monitor progress during the project.

If Travis feels the Jardin Estates development deal requires a more senior manager, he might consider acting as the lead on the project and delegating most of the work to the project team members. In this case, Travis, a seasoned manager, would be overseeing the key account, but he would also be giving employees an opportunity to take on new responsibilities as they gain experience.

Travis's group has just landed a large contract. However, he cannot handle all the work himself.

Topic Objectives

This topic contains relevant information on how to:

- Use different methods to select the right person for the job
- Use different approaches to delegating
- Support, monitor, and track the assignment

The purpose of delegating



Delegation, put most simply, involves the assignment of a specific task or project by one person to another, and the assignee's commitment to complete the task or project. It is one of the most important skills demonstrated by successful managers and one often neglected or overlooked by

"overworked" managers. Effective delegators spend time planning work assignments and organizing resources to achieve business goals in the most productive way possible.

When you delegate, you not only transfer responsibility to another person, but also accountability for maintaining established standards.

The benefits of delegating

“ I not only use all the brains I have, but all that I can borrow. ”
 –Woodrow Wilson

Effective delegation can have short- and long-term benefits for you, your staff, and your organization. When you delegate, you can reduce your workload and stress level by removing from your "to-do" list tasks that others are qualified to do. This increases the time available to you for focusing on projects that require your particular skills and authority, as well as higher-level tasks such as long-term planning and policy development.

Delegating Benefits...	Has These Benefits
You	<ul style="list-style-type: none"> • Improves the level of trust and communication between you and your staff • Achieves goals that require cooperative group effort
Your staff	<ul style="list-style-type: none"> • Improves the level of trust and communication between you and your staff • Achieves goals that require cooperative group effort
Your organization	<ul style="list-style-type: none"> • Saves money for the organization by ensuring that tasks are assigned to the right person at the right level • Increases overall productivity and efficiency by making the best use of organizational resources

Leadership Insight: Freedom to act

Delegation is important because it engages the hearts and minds of your associates. It engages their hearts and minds because it gives them the freedom to act. I'll use the example of Home Depot to illustrate this point.

If a customer comes to Home Depot needing a particular product that isn't in stock, the employee at Home Depot — the associate at Home Depot — can order that product without waiting to get their superior's permission to place that order.

As a result, a customer need is quickly satisfied, and a very happy customer leaves the Home Depot store. When one thinks about delegation and the freedom to act, the benefits accrue from motivated employees who show a great deal of initiative, a great deal of creativity.

Faster decisions get made because they are not sending decisions way up the chain of command and waiting for an answer or a response. Perhaps better decisions, because they most closely identify with what the customer needs are as they think of solutions.

As you are thinking about freedom to act, you might be concerned that this comes with a certain risk: the risk of losing control; the risk that an employee might do something that I may not want that employee to do.

However, there are many approaches organizations can take to overcome these risks. Some organizations design control systems that for — such as codes of conduct — that describe the kinds of behaviors that employees should not engage in.

But most important, organizations that empower create a sense of values — a sense of beliefs — in their associates that always directs them to take the right path. Beliefs and values have their greatest benefit when associates encounter situations that they did not expect.

It is in the creation of beliefs and values, a very important element that organizations must do, that allows organizations not to suffer the risks of empowerment and delegation, while gaining the numerous benefits that I've already outlined.

When employees are trusted to make sound decisions, customers win.

Srikant Datar

Senior Associate Dean, Harvard Business School

Srikant Datar is the Arthur Lowes Dickinson Professor of Accounting at Harvard University. Srikant received the George Leland Bach Award for Excellence in the Classroom at Carnegie Mellon University and the Distinguished Teaching Award at Stanford University.

He is a coauthor of the leading cost accounting textbook "Cost Accounting: A Managerial Emphasis" and of "Rethinking the MBA: Business Education at a Crossroads." Srikant's research interests are in the cost management and management control areas, including activity-based management, quality, and productivity.

His research findings have been published in several prestigious journals, including the Accounting Review, Journal of Accounting and Economics, and Journal of Accounting Research. Srikant serves on the Board of

Directors of Novartis AG, ICF International, KPIT Cummins Info Systems Ltd., Stryker Corporation, and Harvard Business Publishing.

He is a graduate with distinction from the University of Bombay. He received gold medals upon graduation from the Indian Institute of Management, Ahmedabad, and the Institute of Cost and Works Accountants of India. A chartered accountant, he holds two master's degrees and a Doctor of Philosophy from Stanford University.

What gets in the way of delegating?

Delegation makes some managers uneasy. They fear losing control of staff and projects, and worry that they're abdicating responsibility. Sometimes they just believe that doing the job themselves will be most efficient. In the long term, however, these fears and beliefs are rarely justified.

Common Arguments Against Delegating

Argument	Response
"I can do this better and quicker than my staff."	Perhaps you can, but the goal is to support your staff in doing the work.
"I don't have confidence in my staff."	Start off by delegating small tasks and projects that will allow you to build confidence gradually.
"It's easier to do it myself than to organize it, explain it, and monitor it."	This is a short-term view. In general, the time spent planning the project will be worth it, and, over time, your employees will be able to take on more responsibility for structuring and planning their own assignments.
"I like to	Focus your energies on

have things done my way."	communicating your preferences and quality standards rather than on controlling the tasks themselves. This investment will pay off not only for the current project, but for future projects as well.
"My staff will resent the additional work." OR "My staff expect their manager to be the problem solver and decision maker."	Manage the expectations. Make it clear that your role is to support your staff in making decisions for themselves. Also, make it clear that this means opportunities to do new and interesting work. Make sure you follow through.

Key Idea: Signs that your delegating may need improvement

Key Idea

Let's look at some common delegation "warning signs." Do any of these sound familiar to you?

- Your in-box is always full. You are regularly working overtime on tasks that "only you can do."
- You are frequently interrupted by requests for guidance and clarification of work assignments.
- Direct reports feel they are being "dumped on" and lack authority to complete assignments.
- Direct reports feel inadequately prepared to carry out assigned tasks.
- You frequently intervene in tasks or projects assigned to one of your staff.
- You second-guess staff decisions and personally redo unsatisfactory staff assignments.
- Your staff members are not taking responsibility for the tasks or projects you delegate.
- Morale is low and staff turnover is on the rise.
- Delegated assignments are incomplete and deadlines are being missed.

Are you overwhelmed completing tasks that "only you can do"? You may need to improve your delegating skills.

Activity: Assess your delegating skills

How well do you delegate? Use this assessment to find out.

Answer all the questions below to check your delegation skills.

Click Yes or No for each question. Record your answers manually as you go.

1. Spend relatively little of your time completing tasks that require your specific level of skill and authority?
2. Assign tasks to people at the lowest staff level capable of completing them successfully?
3. Question the ability of your staff members to complete job assignments successfully?
4. Let staff members know what you expect of them?
5. Take the time to carefully select the right person for the right job?
6. Give unclear, vague, or incomplete information on assignments when you delegate?
7. Intercede with advice before giving staff members sufficient time to solve their own problems?
8. Use delegation as a way to help employees develop new skills and provide challenging work assignments?
9. Focus on the methods used to obtain results versus the results themselves?
10. Provide staff members with the necessary authority needed to complete assigned tasks?
11. Realize that mistakes may be made and are an important part of the learning process for your staff?
12. Clearly outline expected results and hold your staff accountable for achieving these results?
13. Support your staff with an appropriate level of feedback and follow-up?
14. Feel uncomfortable sharing control with your staff?
15. Recognize that, as the delegator, you retain the ultimate responsibility for the outcome of the delegated assignment?

Use the following key to compute your score. Then select your score from the answers below. A maximum of 15 points is available.

1. Yes = 0, No = 1
2. Yes = 1, No = 0
3. Yes = 0, No = 1

4. Yes = 1, No = 0
5. Yes = 1, No = 0
6. Yes = 0, No = 1
7. Yes = 0, No = 1
8. Yes = 1, No = 0
9. Yes = 0, No = 1
10. Yes = 1, No = 0
11. Yes = 1, No = 0
12. Yes = 1, No = 0
13. Yes = 1, No = 0
14. Yes = 0, No = 1
15. Yes = 1, No = 0

☐ Score range 0-5

You have room for improvement in your delegation skills. Next time you assign a task to someone else, carefully consider the right person for the job. Set others up for success by communicating your expectations clearly and giving them all of the information they will need. And finally, understand that even the best employees will make mistakes—and learn from them.

☐ Score range 6-10

You have the potential to become a first-rate delegator. Remember that delegation is more than a way to get work done—it can be an educational experience for your staff. Ensure that you provide opportunities for your employees to work out their own problems, and realize that even the best employees will make mistakes—and learn from them. If you are uncomfortable sharing control with your staff, ensure that you set them up for success by giving them the information and support they need.

☐ Score range 11-15

You are an effective delegator. You understand that delegation is more than a way to get work done—it can be an educational experience for your staff. Ensure that you provide opportunities for your employees to work out their own problems, and realize that even the best employees will make mistakes—and learn from them.

Establish the right environment



You need to establish the right tone and environment for effective delegating. The most successful managers follow these guidelines:

- Encourage your staff to share their special interests and time availability for new projects.
- Build a sense of shared responsibility for the unit's overall goals.
- Avoid dumping only tedious or difficult jobs on your staff. Instead, delegate projects and tasks that spark staff interest and can be enjoyable.
- Provide possible career opportunity for a staff member by delegating projects, tasks, or functions that involve high visibility with your manager or a high-level manager in another organization.
- Delegate to people whose judgment and competence you trust. Your ability to select the right person reflects your skill in making decisions and setting goals.
- Recognize that delegation is a learning experience for you and your staff, and offer training or coaching as needed.
- Develop trust in a less skilled staff member by delegating very structured assignments and providing the support needed for the person to develop increased competence.
- Whenever possible, delegate an entire project or function, not just a small piece; this will likely increase motivation and commitment.
- Create clear guidelines for follow-up, monitoring, and feedback.
- Maintain open lines of communication. Say "Let me know if you run into any problems you cannot handle."
- Clearly define goals, expected outcomes, and measures of success to minimize wasted time and resources and ensure the task, project, or function is completed successfully.

Delegate to one responsible person



Delegation can be carried out in several ways. It is usually best to delegate responsibility for an entire task, project, or function to one person rather than dividing it among a number of people. This helps

eliminate confusion and encourages initiative and problem-solving. If the person then involves others, you all remain clear as to who is ultimately responsible for the outcome.

Delegate by task

Delegating by task is the easiest approach and a good place to start for those new to delegation. It involves assigning specific tasks or subtasks to staff members. These might include writing a report, conducting research, or planning a meeting.

Delegate by project

A project involves a group of tasks related to achievement of a specific objective. Delegating by project increases the scope of the delegation assignment and generally requires a staff member who can handle a wider range of responsibilities. Examples of project delegations might include developing a new employee handbook, conducting a customer survey, or training employees on a new computer system.

Delegate by function

Some managers with large numbers of direct reports may choose to delegate assignments by function. "Function" refers to groups of tasks and projects that are all related to one ongoing activity such as sales, marketing, or training. In this model, each function is delegated to one staff member who provides the manager with regular updates on activities within that function.

Decide why to delegate



As you prepare to delegate, you first need to clarify in your own mind the purpose or purposes for the delegation. Do you want to decrease your workload? Encourage staff members to develop new skills? Launch an entirely new project or function? Provide staff members with visibility and recognition? Next, you need to determine what tasks you want to delegate, and what skills and capabilities will be required in order to complete the assignment successfully. Finally, you will match the assignment with the most appropriate staff member.

Leadership Insight: Make yourself replaceable

At times when you are in a management or high-level capacity, you need to step away from your office. That's going to happen very frequently. You may be away for a day, and at other times you may be away for a week. And sometimes you may be away for a month.

If you don't create a management style where you feel comfortable in delegating and trusting your group to deliver on some of the tasks that you are responsible for, you could find yourself in a very tough situation. You could find yourself in a situation where you could never leave; you could find yourself in a situation where you cannot respond to other projects or initiatives because your task at hand cannot be delegated to anyone. You never want to find yourself there.

Another aspect of it is that, by delegating, you are actually giving people an opportunity to develop to their potential. You may be actually developing your successor by delegating, and that becomes very important.

I could think of many stories. The most recent one, an example of a job or a set of activities that I delegated to someone when I needed to be away for a month. And it tickled me to see how excited the person was — first of all by knowing that he was selected for such a task, and also knowing how well he had been executing his duties this entire month. I'm actually getting to the point where I'm afraid he's taking my job!

But that itself is such a good feeling for me as a manager. It gives me the feeling that I'm doing the right thing. I'm allowing this person to develop, and I'm also basically creating a situation for myself that in the event that I have to step out, I do know that I can delegate and the job will get done.

Prepare people to step into your role while you're away.

Esther Alegria

Vice President of Manufacturing and General Manager, Biogen Idec.

Esther Alegria is the Vice President of Manufacturing and the General Manager for Biogen Idec, a Pharmaceutical and Biotech industry leader.

She began her career in the pharmaceutical industry as a Quality Control Technician at American Cyanamid and Warner Lambert. For 11 years, Esther also worked for Wyeth Biotech in multiple capacities, including the development of quality control testing and as the Associate Director of Quality Assurance.

Prior to her current position as Vice President of Manufacturing for Biogen Idec, she served the company as Associate Director of Product Quality Management and Director of Quality Assurance/Quality Control.

Esther completed her doctorate in chemistry at the University of Hawaii.

Key Idea: Decide what to delegate

Key Idea

Assess your own workload to determine which tasks, projects, and functions to consider for delegation.

Some jobs can be performed readily by others, but are jobs you have always done or enjoy doing and don't want to give up.

They may include complicated production tasks, fielding requests for information or materials, analyzing your budget, or managing a staff member.

Be open to delegating these: some of them can add variety to staff workload and provide motivational challenge to the right individuals.

Some jobs could be performed by others with the right training or experience. Delegating these assignments can provide staff members with opportunities to develop new skills and talents and increase the pool of people who can take responsibility for critical assignments.

In other areas, if a task is too important to delegate to someone else, think about sharing responsibility.

For example, think of ways to subdivide a task so that you handle a discrete part of the task and you delegate the rest.

How do you decide what to delegate? Which tasks should you keep and which should you assign to someone else?

What not to delegate

Not all tasks should be delegated. As a manager, you should retain responsibility for such things as:

- Planning, directing and motivating your team
- Employee performance evaluation
- Complex customer negotiations
- Tasks requiring your specific set of technical skills
- Hiring, firing, and career development

Other nonassignable tasks will depend on your circumstances.

Activity: To delegate or not to delegate?

Delegation is not always appropriate. In each of these scenarios, decide which tasks can be delegated and which cannot be.

Susan is a regional sales manager. She is having a busy and successful season and is in the midst of closing several major deals. Which of the following tasks could she delegate?

- ☐ Hiring a new salesperson, developing next quarter's strategic plan, and negotiating a deal with three other parties

Not the best choice. As manager, Susan is responsible for her team. It would not be appropriate for her to delegate hiring decisions and other staffing responsibilities. Susan is also responsible for providing a long-term vision for the department, as well as translating it into detailed, quarterly plans that will guide her employees' work. She can, however, save herself some time by delegating discrete research tasks to provide data input for the quarterly plan.

And since the negotiation is complex and involves three other parties, Susan is probably the only person who can manage it efficiently and not lose any progress that has already been made towards reaching agreement. It might take her as long to brief someone else on the priorities and goals of each party as it would to do the negotiating herself.

- ☐ Answering requests for information from potential clients and coordinating an annual departmental conference

Correct choice. Susan can delegate the task of answering requests for information. It will educate the staff member both on the topic of the request and the personal relations skill of working with clients.

A recurring project like the coordination of an annual conference has a built-in "infrastructure" to support the organizer: the speakers, the person who coordinated the previous conference, and the files from that event. Therefore it is a good type of project for Susan to delegate to a subordinate, because she knows that others can help answer questions along the way.

Haille's experienced staffers are attending a two-day, offsite seminar. The employees remaining in the office are fairly recent hires, without solid programming skills. Which of the following tasks could she delegate?

- ☐ Investigating options for a new task-management system, double-checking an equipment order list against the specifications, and posting updates to the organization's website

Correct choice. Haille could delegate the investigating task, but she should describe it as the preliminary research stage. Haille should then consult the experienced staff members to act on, or to supplement, the information that the junior staff member finds.

Double-checking an equipment order list will probably not require in-depth knowledge, and Haille will not be relinquishing responsibilities inherent to her role as manager.

Posting web updates is another good candidate for delegation. It builds technical web skills, as well as content knowledge of the updates being posted. If Haille's staffers have not posted to the website before, she should show them the process before they begin.

- ☐ Adding reporting features to a critical piece of code and developing a strategy for motivating the team to accomplish a particular milestone

Not the best choice. Inexperienced employees do not have the technical skills to modify a critical piece of code. Furthermore, such a task is too high-risk to be used as a learning opportunity.

Motivating a team and judging what it can accomplish by when are managerial-level capabilities. Haille cannot delegate this responsibility.

Charon, one of Weiya's employees, was working on a project that has been cancelled. Before the next project begins, Weiya wants Charon to devote some time to internal department affairs. Which of the following tasks could Weiya delegate to Charon?

- ☐ Reviewing the monthly progress report Weiya has prepared and creating a tip sheet for new employees

Correct choice. Assuming the progress report does not contain confidential material, then it is appropriate to ask Charon to proofread and perhaps comment on the contents.

Another pair of eyes is always helpful in this process, and Charon will welcome a chance to voice her opinion.

Drafting the tip sheet is appropriate for delegation. In the process, Charon can use her own experiences as a new employee, as well as ask colleagues for suggestions. However, as manager Weiya should approve the final text, which will be an official departmental document.

- ☐ Conducting a yearly evaluation for a junior staffer, helping another employee create an action plan for improving his organization and productivity skills, and reviewing and submitting the department payroll changes to accounting

Not the best choice. Weiya bears the responsibility for evaluating her staff. She cannot delegate this responsibility.

Asking Charon to help with creating action plans would be inappropriate. Weiya, as manager, needs to develop her employees.

It would be inappropriate for Charon to learn how much her peers are being paid. Weiya should exercise discretion and keep payroll information private.

Identify skills required for the assignment

You will not be able to select the best person for a given assignment until you have analyzed the work involved and determined what skills are required. The analysis involves answering these three questions:

- What kinds of thinking skills are needed for this job? (For example, problem-solving ability, logical thinking, decision making, planning, creative design)
- What are the activities that must be performed and what systems or equipment will be needed? (For example, creating a new database, organizing, training, developing)
- What interpersonal skills are needed to complete the assignment? (For example, speaking with suppliers, negotiating for resources, consulting with experts)

Key Idea: Match the person to the task

Key Idea

Ask yourself, "Which of my direct reports is the right person for the job?" Compare the skills required with the characteristics and capabilities of each of your staff members. Be sure to

consider:

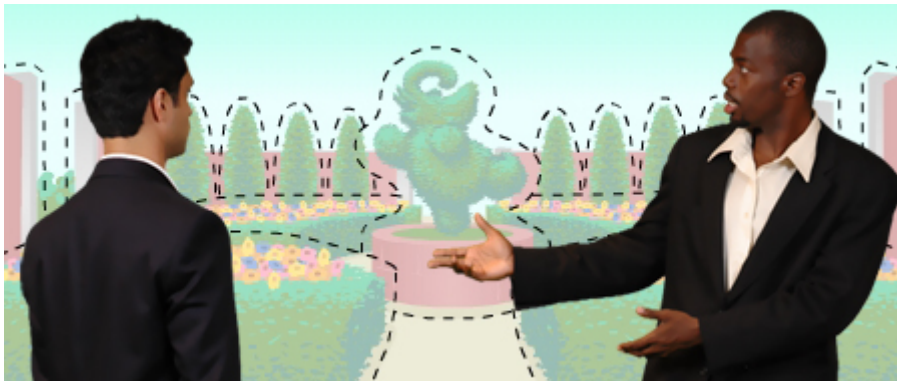
- Any previously expressed needs or desires for growth and development that could be addressed with this assignment. Ask yourself who has shown initiative and asked for a new challenge.
- Think about the staff member's availability. You may want to avoid choosing an employee whose work on another project would need to be interrupted.
- Also, think about the number of previous assignments you have delegated to that person. Try to delegate tasks among all staff members to avoid any feelings of favoritism.
- Consider the level of assistance a staff member would need from you to complete the assignment and how much time you have available.
- Think about how long the staff member has been on the job. Avoid overloading new employees with added assignments until they are comfortable with their new jobs.
- Consider the possibility of dividing the task between two or more people to make the best use of skills.

You'll be in a better position to select the right people if you routinely keep track of special skill sets that you may need to call upon for special projects.

For example, someone who can simplify abstract concepts might be a good trainer with new employees, while good organizational abilities would be important for someone overseeing operations.

You have decided what to delegate. How do you decide which team member to select?

Set up the discussion



Once you've identified the right person for the task, you need to communicate the proposition clearly. Ideally, you should do this in a face to face meeting in which you describe the assignment and secure the employee's commitment to perform the task. Open communication and trust are critical factors in this interaction. To achieve both, it is important to include the following in your discussion:

- A clear definition of the project, task, or function and the scope of the responsibilities being delegated
- A review of performance standards, criteria for success, and timelines for completion
- A survey of available resources and the need for any special training, coaching, or assistance
- A specific description of the level of authority being delegated
- A plan for follow-up and feedback to monitor progress

Key Idea: Grant authority

Key Idea

In granting authority to a staff member, it is important to establish clear guidelines and expectations from the start. The amount of authority you choose to give an individual depends upon his capabilities and your confidence in him or her. You will want to:

- Assess the staff member's past performance in making decisions
- Consider the consequences of wrong decisions by your staff member and decide what degree of risk you are willing to take
- Determine the minimum amount of authority needed to complete the assignment successfully

The Authority Continuum illustrates the range of authority levels you may choose to delegate.

After you have determined the level of authority you will delegate, be sure to communicate your decision to everyone involved in the assignment.

You have delegated a task to someone else. What else do you need to do to ensure the delegation is successful?

Track delegated assignments



One of the biggest challenges for the delegating manager is to ensure that the employee you have delegated to does not fail. The best way to ensure success is to maintain an adequate level of control by providing target completion dates and regular monitoring of progress. Depending on the number and complexity of delegated assignments, you may use one or more of the following techniques for monitoring:

- Referral folders for each task or project
- An assignment log that tracks all projects, tasks, or functions within your department
- A giant wall calendar
- Staff meetings
- Written status reports
- Project management/tracking software

Key Idea: Provide support

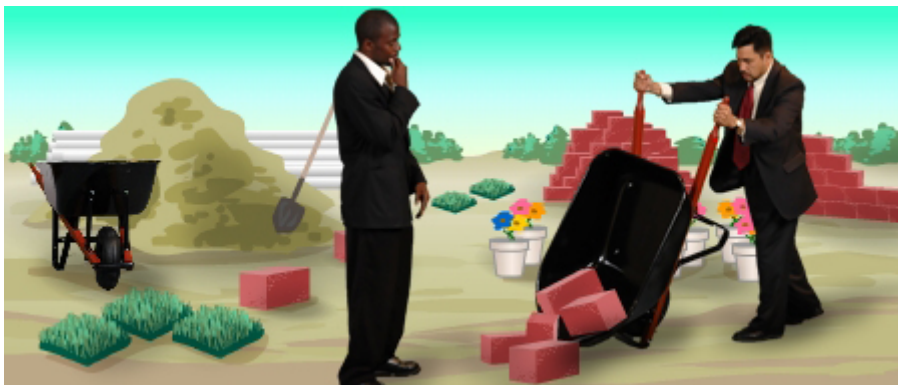
Key Idea

Once an assignment is delegated, you need to continue to provide support without being intrusive. You strike the right balance when you:

- Notify all relevant personnel of the authority you have delegated with the assignment
- Review resource needs and ensure that appropriate supplies are available
- Continue to supply any needed information such as reference materials or reports that may have a bearing on the assignment
- Make clear when you want to be involved; for example, you need to be involved when it looks like a commitment won't be met or when major problems have arisen
- After work begins, intercede with advice or directions only if requested
- Point out any difficulties you may see ahead based on your experience with similar projects
- Remember to focus on results and not on the methods or approach used to achieve them

You have delegated tasks to others. How do you monitor their progress and help them succeed?

Reverse delegation



Reverse delegation occurs when a staff member to whom you have delegated an assignment either wants to return the job to you or expects you to solve problems and make decisions. Resist the temptation to step in. This is an opportunity for you to build trust and confidence in your employee by:

- Providing positive reinforcement for work done so far
- Helping the employee to assess the situation
- Confirming your confidence in the employee's ability to make decisions
- Encouraging the employee to come up with a solution
- Providing coaching as needed to help the employee refine his or her new skills

Leadership Insight: Creating a win-win

For me delegating is actually about creating a win-win. I had this new operations head I hired who did not really have the confidence to make the judgments in the first time that he joined us.

Putting him into the right place required me to really think about how exactly do I help him reach that level. He would require me to actually help him out with every part of what he is doing in some of the instances during the day and I asked myself, do I really go and jump into it, am I supposed to be doing that for him?

And I made a decision based on a simple analogy I picked up, to say that he is going to learn to swim on his own. I know he is kind of struggling. He is in the water and he really wants me to help him, but if I don't let him be there on his own, he is not going to make it. And that's what made me just back off and give him just broad guidelines, empower him enough to say that I trust you with the judgment, go ahead just do the judgment, do it on your own.

While I was doing that, I had my senses on all the time about whether or not he was making the right judgments, and that's something that just kept on growing to a level where one day when we were sitting in a coaching session, this guy actually confessed to me, "I was really getting worried — why doesn't this guy help me? — but today I understand when I am able to make those judgments, having gone through a series of them, it's been really useful for me."

And this was a win-win for me in multiple other ways because when I look at the whole team that got created through the same principle, it helped me personally grow to a level where I was replaceable in one way that was not insecure for me but was a way by which I could also grow in the organization.

When employees struggles to make decisions, offer broad guidelines but allow them to gain confidence in making their own judgments.

Vineet Kapoor

Director, Strategic Initiatives, Synthes Asia Pacific

Vineet Kapoor is the Director of Strategic Initiatives for Synthes Asia Pacific. Synthes is a leading global medical device company that develops, produces, and markets instruments, implants, and biomaterials for the surgical fixation, correction, and regeneration of the skeleton and its soft tissues. Synthes Asia Pacific covers markets including Japan, China, India, and Australia.

Previously, Vineet was the Managing Director of Indian operations for Synthes, where he developed and managed a leadership team consisting of heads of Sales, Marketing, Customer Services, Operations, Finance, and HR. During this time, he directed the strategic transformation and manifold growth of the Indian business by revisiting and restructuring key areas of the business to better align them to the market dynamics.

Besides being an alum of Harvard Business School, Vineet is an associate of the Institute of Chartered Accountants of India and has a bachelor's degree in commerce from the University of Delhi. He has also completed master's level study in Neuro Linguistic Programming (NLP) for interpersonal excellence and coaching.

When the delegation is in trouble

There may be situations when you need to reassess a staff member's ability to complete an assignment successfully. In most cases, your employee will be able to work through his or her difficulties with your assistance. You can help get the project back on track by:

- Completing selected parts of the assignment to lighten the load on the employee
- Offering additional resources, if available, to provide assistance
- Helping the employee to solve problems without placing blame for any difficulties
- Creating an agreed-upon plan of action and a timetable for addressing the problems

Only in extreme cases should you consider taking back the delegation. Do this only if major problems are evident: if critical deadlines will be missed, or if failure to meet established goals will have a serious negative impact on other projects.

Activity: Improve the delegating process

Spot the delegation faux faux and determine how to rectify these situations.

Lydia, vice president of public relations at a publishing firm, is overwhelmed with work. Nevertheless, her supervisor has just given Lydia another assignment, asking her to organize a small launch party for a new book, including selecting the party's theme. In turn, Lydia concludes that one of her staff members could manage the project.

In deciding which person could best organize the launch party, which of the following criteria should she *not* consider?

- ☐ Skills and capabilities

Not the best choice. Lydia *should* consider these criteria. Lydia should only delegate the project to someone who can complete it satisfactorily. Although an employee's interest in the assignment is helpful, his or her relevant knowledge is most important.

- ☐ Compatibility with her personal style

Correct choice. Lydia may prefer that the employee implement the assignment the way that she would, but Lydia should be more concerned with results when she is delegating tasks.

- ☐ Availability and workload

Not the best choice. Lydia *should* consider these criteria. Lydia should not assign the project to an employee with a full load, regardless of the skill set. Overworking a staff person will result in poor quality work and lower morale in the team, if others think that that will be Lydia's regular approach to delegating.

- ☐ The number of previous assignments delegated to the individual

Not the best choice. Lydia *should* consider this criterion. Lydia should try to rotate delegation of tasks between her staff members, to avoid the appearance that she's favoring (or overworking) a single employee. At the same time, it may be justifiable to assign a critical or high-profile project to someone who's successfully completed a delegated project before.

Lydia delegated the project to Marco, a marketing writer who had expressed a keen interest in event planning. After verbally assigning him the project, she outlined the project tasks and responsibilities in an email. Which of these additional actions is *not* necessary to ensure a successful transition of the project to Marco?

- ☐ Schedule a face-to-face meeting

Not the best choice. This *would* help ensure a successful transition. Arranging a meeting helps open the lines of communication. Impersonal conversations through email or telephone can frequently lead to confusion and disappointing results. A face-to-face discussion would clarify Marco's understanding and establish Lydia's expectations.

- ☐ Review performance standards and criteria for success

Not the best choice. This *would* help ensure a successful transition. If Marco clearly understands Lydia's (and her supervisor's) expectations and standards for the event, this will save them both time later on and unexpected surprises at the event. However, managers delegating a project should always be available for interim check-ins of some form.

- ☐ Allow Marco to define the project tasks

Correct choice. Although it would be good to give Marco the opportunity to express his vision, Lydia should be sure he also understands what she expects. If he leaves certain tasks undone, she could be very disappointed with the results. For some types of tasks (such as writing or running a brainstorming session), where results are more important than the process used, an employee's suggestions can be given more weight. However, for something "public" like event planning, there are usually standards for the process of working with vendors that the manager should spell out.

- ☐ Develop a plan for follow up and feedback

Not the best choice. This *would* help ensure a successful transition. Lydia should ensure she's available for questions and guidance. She must strike a balance between spelling out all the details and giving Marco so much independence (especially if it's his first time on this type of project) that he will flounder. He will need direction, but it defeats the purpose of delegating to constantly monitor Marco's progress.

Because Lydia did not clearly delineate how much authority Marco could exercise in planning the event, Marco spent substantially more on catering than Lydia had budgeted. Which of the following should Lydia have considered when delegating authority to Marco?

- ☐ Defining clearly which responsibilities she is delegating to Marco

Correct choice. Lydia should have considered the decisions Marco would need to make and clearly delineated those he should have consulted her about. It would be best to define those in terms of resource or authority constraints. For example, Marco should consult Lydia on purchases above a certain dollar limit, decisions requiring more than 3 hours of Marco's time to research, or communication with a person above assistant director level.

- ☐ Adjusting the budget for Marco's project vision
Not the best choice. There was no need to adjust the budget. If Lydia had made her budget parameters clear to Marco at the project start, she could have avoided this problem.
- ☐ Asking Marco to clear all project decisions with her
Not the best choice. Requiring him to clear all of them with her would be inefficient, defeat the purpose of delegation, and imply lack of trust; however, asking him to clear certain major choices can avoid confusion and lead to project success.

After Lydia helps resolve the catering budget issue, she decides to establish a better process for supporting Marco. Which of the following approaches should she take to help Marco?

- ☐ Offer personal advice on each task facing Marco
Not the best choice. Over-supporting Marco wastes Lydia's time and robs him of a chance to learn. However, giving general, start-up advice from past experience and being available to answer his questions is very helpful.
- ☐ Clarify when Marco should involve Lydia
Correct choice. If Lydia had clearly stated critical points at which she should be consulted, they could have avoided the budget misunderstanding. This support could help Marco produce better results without overwhelming him.
- ☐ Allow Marco to gather the resources he thinks he will need
Not the best choice. Marco may not have the perspective or the clout to command all the possible resources he may need, nor the sensitivity to financial or other resource constraints. At the same time, Lydia may not be able to foresee all the project needs that may develop, and the process of seeking lower-level resources may be educational for him. The best plan is for Lydia to start him off with the minimum necessary to produce a good result, and allow him some discretion to seek additional lower-level resources, but make clear when her approval is required.

Step back and reflect



In order to process lessons learned from delegation, it is important to step back and reflect at the conclusion of each assignment. Set up an evaluation discussion with your employee, and during the discussion:

- Ask for the employee's opinion about how this delegation worked for him or her
- Recognize the employee's achievements and provide positive reinforcement for tasks done well
- Compare the results achieved with the expected standards
- Avoid criticism and blame for any problems and discuss possible improvements for future projects
- Create a plan of action to continue to support the employee's growth through ongoing coaching or additional training

You should also take steps to ensure that your employee gets recognition for her work, not only from you, but from your peers, your manager, and the customer, as appropriate.

Frequently Asked Questions

How can I avoid having my staff members feel like I'm dumping work on them?

- Balance the assignment of tasks seen as tedious or difficult with tasks and projects that spark staff interest, can be enjoyable, and may gain them recognition by others.
- Split tasks or projects seen as mundane among more than one staff member as well as yourself to promote a sense of shared responsibility for jobs seen as boring or unpleasant.
- Seek input from your staff as to the types of assignments they find interesting and challenging.
- Clearly communicate the benefits and opportunities from their point of view.

Is it okay to use delegation as a way of testing a staff member's capabilities before proceeding with a promotion?

Yes! It can actually be helpful to a staff member to have an opportunity to assume some of the responsibilities related to a new position. It gives both of you a chance to evaluate capabilities and check the match of skill sets needed for the job. If additional training is required, that can be implemented as part of a development plan or the promotion.

What if I can't find a staff member with the skills I need to complete a task?

- Train or coach someone to develop the skills you need.
- Consider looking outside your group or your organization for the expertise you need. You may be able to borrow a staff member who would like the opportunity, or hire a temporary worker for a short or fixed duration.

- Review the task to see if you can divide it into subtasks for which one of your staff may have the needed skill sets.

How do I handle delegating upward?

- Delegating upward is a legitimate and appropriate request for assistance that requires escalation to a higher management level. It is not an attempt to dump a problem or issue back into a manager's hands.
- It is important for managers to understand that they may need to advocate to senior management levels on behalf of a staff member responsible for a specific task or project.

Overview

This section provides interactive exercises so you can practice what you've learned. These exercises are self-checks only; your answers will not be used to evaluate your performance in the topic.

Scenario

Assume the role of a manager in a fictional situation and explore different outcomes based on your choices (5-10 minutes).

Check Your Knowledge

Assess your understanding of key points by completing a 10-question quiz (10 minutes).

Scenario: Part 1

Part 1

Martin knows that life as a product line manager is always hectic. But lately, he's been flooded by e-mail and voicemail, and he can't keep up. He's worked nights and weekends for the past month, trying to stay on top of things that he feels only he can do. Yet he's also heard rumblings around the office that employees feel they lack authority. When Martin mentions this to his mentor, Robin, she tells him, "It's time to start delegating."

The biggest thing on Martin's plate is an upcoming product launch: a time-consuming effort that he hasn't even started. Members of his group have all expressed an interest in taking on more responsibility, and each has different strengths. Martin considers how to go about delegating some of his tasks.

What approach should Martin take?

- **Match the tasks he feels he can delegate with the skills each person has**

Correct choice.

Preparing to delegate is the first key step. Clarify in your own mind the purpose of the delegation. For example, do you want to

decrease your workload? Launch an entirely new project or function? Provide staff members with visibility and recognition? In Martin's case, the primary purpose is to decrease his workload to enable him to focus on the things that require his skills and knowledge.

Next, determine what tasks you want to delegate, and what skills and capabilities will be required in order to complete the assignment successfully. Finally, match the assignment with the most appropriate staff member.

- **Make members of his group jointly responsible for the product launch**

Not the best choice.

It can be appealing to give more than one person a piece of the action, particularly when several staff members express a desire to take on more responsibility and each has different strengths. However, you should delegate an entire task, project, or function to one person rather than splitting it among several people. By delegating to one person, you eliminate confusion, make accountability clear, and encourage initiative and problem solving.

- **Identify which tasks have been taking up most of his time, and delegate those—so he can focus on the product launch**

Not the best choice.

While it can be appealing to get rid of time-consuming or tedious tasks, managers need to delegate tasks that staff members will find rewarding and that meet the specific skills of the people taking on the assignments. Giving employees the most tedious tasks makes them feel "dumped on" and does not build on their strengths and interests. Delegating more challenging assignments can help staff members develop new skills and can increase the pool of people able to take responsibility for critical assignments later.

Scenario: Part 2

Part 2

Martin decides to delegate the upcoming product launch to a staff member. He identifies the particular skills required to handle the assignment, and decides that Joy is the best match. She knows the product well and has worked on product launches before, although she hasn't led one. Joy likes independence and works well on her own—and she is eager to prove herself.

Martin considers how he and Joy should work together to plan and execute the product launch.

What approach should Martin and Joy take?

- Joy provides Martin with alternatives and recommendations, from which Martin makes decisions.

Not the best choice.

Joy has worked on large projects before and will feel frustrated by having little authority. She is eager to demonstrate her ability to handle the project.

Before granting authority, assess the staff member's past performance in making decisions, determine the minimum amount of authority needed to complete the assignment successfully, and consider the consequences of wrong decisions by your staff member. Then decide what degree of risk you are willing to take in delegating authority to that individual and make sure the person has that authority.

- Joy makes decisions as needed and notifies Martin prior to any implementation.

Correct choice.

Joy has been involved in past product launches and has observed product line managers lead the process. Giving her authority to make decisions will allow her to rise to the occasion. However, having her check in with Martin before implementing decisions ensures that he will have an opportunity to approve her decisions and share his knowledge and experience.

- Martin assigns full responsibility to Joy, empowering her to make and implement decisions.

Not the best choice.

Running a product launch is a new experience for Joy, so Martin should not abdicate all responsibility. Some checks and balances are necessary. Martin should give Joy a level of authority in line with her experience, yet enable her to grow and gain confidence—both her own and Martin's.

In some cases, granting complete authority is the best way to delegate. For example, if this product launch is successful under Joy's leadership, Martin should feel more comfortable granting her more authority the next time he delegates a task to her.

Scenario: Part 3

Part 3

A few weeks have passed since Martin delegated the product launch to Joy. Planning has steadily progressed. Joy is excited to have the added responsibility and feels confident that all is going well. Martin is pleased with her performance—and pleased that he has more time for other work.

One day, during a routine meeting with the Marketing group, Martin finds out that they are unusually busy. He knows that Marketing plays an essential role in a successful product launch, and is concerned that they may not complete the marketing materials in time for the launch.

What should Martin do?

- **Mention his concerns to the Marketing group at the end of the meeting**

Not the best choice.

By stepping in, Martin undermines the authority he has delegated to Joy. While it is sometimes necessary for a manager to get directly involved after delegating a task, he or she should do so only when the direct report needs assistance or support. Preemptively stepping in to control a *potential* situation—even if this is convenient—does not demonstrate confidence in the direct report's ability to handle the situation.

- **Ask Joy how the planning is going and what she needs, and provide support**

Correct choice.

After delegating an assignment, you need to continue providing support, but without being intrusive. To strike the right balance, you should point out any difficulties you may see ahead based on your experience with similar projects, and supply information that may have a bearing on the assignment. Intercede with suggestions or directions only when your staff member asks for them. Also, make clear to the employee when he or she must involve you—for example, when it seems a commitment won't be met or when major problems have arisen.

- **Respect Joy's confident appraisal of the project status and trust her ability to handle marketing deadlines**

Not the best choice.

Delegating without providing support is a recipe for disaster. Joy doesn't have as much experience as Martin in dealing with product launch problems. Leaving her to flounder when a problem arises jeopardizes the launch, as well as Joy's ability to prove herself and to take on more responsibility in the future. Delegating successfully is a balance between providing support and not being intrusive. Managers should provide only enough

support to help the direct report succeed with the delegated task.

Scenario: Conclusion

Conclusion

Joy launches the product without a hitch. By matching the right tasks to the right person, Martin successfully delegated the launch. Joy learned from her experience and benefited from Martin's occasional support. And Martin was able to focus his time and effort on other work. Delegating offers many benefits. It strengthens trust and communication between you and your group.

For the group, delegation can increase motivation, enable individuals to enhance existing skills and develop new ones, and provide them with an important sense of achievement.

For a company, delegating ensures that the right person at the right level performs a task, makes the best use of resources, and improves overall efficiency and productivity.

Activity: Check Your Knowledge: Question 1

When delegating, it is usually better to delegate responsibility for an entire task or project to one person rather than dividing it among a number of people. True or false?

- True

Correct choice.

It's true: delegating an entire task or project to one person helps eliminate confusion and encourages initiative and problem solving. If that person then involves others, it is still clear who is ultimately responsible for the outcome.

- False

Not the best choice.

This statement is actually true. An entire task or project is best delegated to one person. Doing so helps to eliminate confusion and encourages initiative and problem solving.

Check Your Knowledge: Question 2

How can delegating increase overall productivity and efficiency?

- By matching skills with people, you make the best use of organizational resources

Correct choice.

Delegating effectively can increase overall productivity by making the best use of organizational resources.

In addition, delegating can increase the time available to you for focusing on higher-level tasks such as long-term planning, policy development, and projects that require your skills and authority.

- By reducing your level of stress, you become more productive

Not the best choice.

Delegating effectively increases overall productivity not because it reduces your level of stress but because it makes the best use of organizational resources.

When you reduce your workload by removing noncritical tasks from your "to-do" list, you have more time to work on higher-level tasks that are more aligned with a manager's responsibilities—such as long-term planning and policy development.

- By focusing on team efforts rather than individual efforts, you build morale

Not the best choice.

Delegating effectively increases overall productivity not because it focuses on team efforts but because it makes the best use of organizational resources.

When you reduce your workload by removing noncritical tasks from your "to-do" list, you have more time to work on higher-level tasks that are more aligned with a manager's responsibilities—such as long-term planning and policy development.

Check Your Knowledge: Question 3

What approaches might you consider using to determine what and how to delegate?

- By seniority, by job responsibility, or by team

Not the best choice.

You don't delegate by seniority, job responsibility, or team. Instead, you delegate by task, by project, or by function.

Delegating by task involves assigning specific tasks or subtasks to individuals. Delegating by project involves assigning a group of tasks related to a specific objective. Delegating by function involves assigning groups of tasks related to a type of activity, such as marketing or sales or training.

- By task, by project, or by function

Correct choice.

Delegating by task involves assigning specific tasks or subtasks to individuals. Delegating by project involves a group of tasks related to a specific objective. Delegating by function involves groups of tasks related to a type of activity, such as marketing or sales or training.

- By who volunteers, within a team, or within your direct reports

Not the best choice.

You don't delegate based on who volunteers, within a team, or within your direct reports. Instead, you delegate by task, by project, or by function.

Delegating by task involves assigning specific tasks or subtasks to individuals. Delegating by project involves assigning a group of tasks related to a specific objective. Delegating by function involves assigning groups of tasks related to a type of activity, such as marketing or sales or training.

Check Your Knowledge: Question 4

Occasionally, you may need to consider bringing in resources from outside your organization. In addition to checking references and getting written proposals, what should you examine?

- The additional time needed to manage any outside consultants or temporary workers

Correct choice.

You will need to find time to manage any outside consultants or temporary workers.

On the positive side, however, outside resources can fill in for short-term gaps in staffing and may save time and money over the long term.

- The additional long-term costs of outside resources

Not the best choice.

By reviewing written proposals, you would have already considered additional long-term costs of outside resources. The correct answer is "The additional time needed to manage any consultants or temporary workers." When using outside resources, you will need to manage them. This adds to your own workload.

However, outside resources can provide specific expertise and save time and money over the long term.

- How it might look to your management if you don't do the work yourself

Not the best choice.

Your manager likely expects you to use outside resources if needed rather than trying to do everything yourself. The correct answer is "The additional time needed to manage any consultants or temporary workers." When using outside resources, you will need to manage them. This adds to your own workload.

However, outside resources can provide specific expertise and save time and money over the long term.

Check Your Knowledge: Question 5

Which of the following "delegations" is *not* an example of delegating by project?

- [Conducting a customer survey](#)

Not the best choice.

Conducting a survey is an example of delegating by project, since it involves many tasks. The delegation that is *not* an example of delegating by project is writing a memo requesting feedback on a recent group presentation. This is a task, not a project.

Reminder: The difference between a project and a task is that a project includes a number of tasks related to the achievement of a specific objective.

- [Writing a memo requesting feedback on a recent group presentation](#)

Correct choice.

Writing a memo requesting feedback on a presentation is a *task* delegation, not a *project* delegation.

- [Training the team on a new computer system](#)

Not the best choice.

Training a team is an example of delegating by project, since it involves many tasks. The delegation that is *not* an example of delegating by project is writing a memo requesting feedback on a recent group presentation. This is a task, not a project.

Reminder: The difference between a project and a task is that a project includes a number of tasks related to the achievement of a specific objective.

Check Your Knowledge: Question 6

What set of questions might you want to *first* ask yourself about a task that could help you delegate it appropriately to the right person?

- [What thinking skills are needed for this task? What activities must be performed? What interpersonal skills are needed to complete the task?](#)

Correct choice.

Before you delegate, consider the skills needed, the actual physical activities involved, and whether or not strong interpersonal skills are required.

Once you've identified the parameters of the task, you should compare the skills the task requires with the availability, capabilities, and developmental needs of each of your staff members.

- Who has the time available to complete this task? Who has done this kind of task before? Who has the right equipment available?

Not the best choice.

You wouldn't ask yourself these kinds of questions until *after* you had determined the skills and activities needed to perform the task.

- When does the task need to be completed? Who will do it the way you want it to be done? Who will not resent having the additional work this will involve?

Not the best choice.

You wouldn't ask these kinds of questions until *after* you had determined the skills and activities needed to perform the task.

Check Your Knowledge: Question 7

Is it okay to use delegation as a way of testing an employee's capabilities before proceeding with a promotion?

- Yes. It's a way to check the match between the employee's skill sets and the requirements of the new position.

Correct choice.

Using delegation to test an employee's capabilities can be helpful before you consider moving him or her into a new position. It gives both of you a chance to evaluate capabilities and to check the match of skill sets needed for the job. If the employee needs additional training, you can arrange for it as part of a developmental plan.

- No. It's not fair to ask an employee to demonstrate a different set of capabilities other than those required for his or her current position.

Not the best choice.

Delegating projects or tasks actually *can be helpful* to an employee, because it gives him or her an opportunity to assume some of the responsibilities related to a new position. Delegating also gives both of you a chance to evaluate capabilities and to check the match of skill sets needed for the job. If the employee needs additional training, you can arrange for it as part of a developmental plan.

Check Your Knowledge: Question 8

What of the following best describes reverse delegation?

- You take back an assignment you originally delegated to someone else in order to complete it effectively.

Not the best choice.

Though you may feel tempted to take back work you've delegated if the employee isn't carrying out the task effectively, this isn't the definition of reverse delegation. Reverse delegation occurs when the person to whom you have delegated a task wants to give it back or expects you to solve problems or decisions related to the assignment. While you may want to step in and help, resist the urge. This situation provides you with an opportunity to build trust and confidence by helping the individual complete the task.

- Someone to whom you delegated an assignment wants to return it to you or expects you to solve problems and make decisions related to the assignment.

Correct choice.

Reverse delegation occurs when the person to whom you have delegated a task wants to give it back or expects you to fix problems related to it. While you may want to step in and help, resist the urge. This situation provides you with an opportunity to build trust and confidence by helping the individual complete the task. For this reason, you should try to avoid taking back a delegated task.

Check Your Knowledge: Question 9

Which of the following *is* a situation in which it might be best to take back a delegated assignment from an employee?

- When completing the task yourself would take less time than offering support to the employee

Not the best choice.

You shouldn't take back a delegated task simply because it would take less time for you to complete it. Consider taking back a delegated assignment *only* if major problems arise, such as missed deadlines, that would seriously undermine other projects.

However, try to support the employee in completing the assignment in any way possible. For example, consider taking back only part of the assignment or offering additional resources.

- When completion of the task appears to be out of control and your management capability may be on the line

Not the best choice.

You shouldn't take back a delegated task simply because you're worried about your reputation. Consider taking back a delegated assignment *only* if major problems arise, such as missed deadlines, that would seriously undermine other projects.

However, try to support the employee in completing the assignment in any way possible. For example, consider taking back only part of the assignment or offering additional resources.

- When critical deadlines might be missed without assistance from you or others

Correct choice.

If major problems surface—like missing a critical deadline—that will seriously undermine other projects, you may need to take back a delegated assignment.

However, try to support the employee in completing the assignment in any way possible. For example, consider taking back only part of the assignment or offering additional resources.

Check Your Knowledge: Question 10

Does it make more sense to delegate to the most experienced individual available or to the person with the lowest possible skill level required to perform the task effectively?

- Delegate to the most experienced individual available

Not the best choice.

By delegating to the most experienced person available, you're not making the best use of staff resources. Instead, try to delegate to the person with the lowest possible skill level required to perform the task effectively.

Frequently, delegating to the lowest possible skill level also builds employees' capabilities more quickly, which then makes more experienced employees available for new challenges.

- Delegate to the person with the lowest possible skill level required to perform the task

Correct choice.

Always delegate to the person at the lowest possible skill level required to make the best use of staff resources. Frequently, delegating to the lowest possible skill level also builds employees' capabilities more quickly, which then makes more experienced employees available for new challenges.

Check Your Knowledge: Results

Your score:

Steps for delegating to the right person

1. Be aware of the skills associated with specific tasks or functions.

Certain kinds of conceptual abilities are often associated with specific tasks or functions.

For example, someone who can simplify abstract concepts might make a good trainer while good organizational abilities would be important for someone overseeing operations.

As you delegate, it is important to keep these kinds of skills in mind to ensure that you make the most effective match of tasks and people.

2. Become familiar with your own strengths and weaknesses and those of your staff.

Be clear about what each member of your staff can and cannot do. Don't assume skills are transferable to all situations.

For example, a great telephone sales representative may freeze in a face-to-face selling situation.

- Don't be afraid to take advantage of the skills of more than one person in completing a task. For instance, one person with excellent writing skills may write the text for a new brochure and then pass it on to another person with graphics and production skills to complete layout and final development.
- Challenge your staff members with assignments that test their skills so they can discover new capabilities.
- Keep track of special skill sets that you may need to call upon for special projects.

3. Coordinate everyone's skills to achieve the most complementary fit.

When you have a pool of skills to choose from, pairing up people with complementary skills can help you achieve the best results.

For example, you might ask one staff member with great people skills to conduct telephone interviews with customers and a second person with great analytical skills to examine the feedback and write a report.

Knowing your staff's strengths and weaknesses can help you assemble the best team for any assignment.

4. If necessary, look for resources outside your own group, and don't forget your supervisor as a possible resource.

There may be times when you cannot find the skills you need for a specific assignment within your staff or you have exhausted the use of your own resources.

Look outside your own group to colleagues or other departments for the expertise you need, and offer to exchange services in return for their assistance.

Don't be reluctant to delegate to your supervisor if that seems appropriate.

5. Consider using resources outside your organization.

There may be times when you need to consider the use of outside consultants or temporary workers to:

- Fill in short-term gaps in staffing
- Provide specific expertise
- Conduct an independent evaluation
- Help in long-term planning

- Save time and money over the long term.

Before hiring any consultant, check references and obtain a written proposal that addresses your needs. Be aware that you will need to manage any consultants or temporary workers.

Steps for communicating the assignment

- 1. Set up a face-to-face meeting with the person to whom you are delegating an assignment.**
 - A critical component of the delegation process is the interaction between you and your employee at the time the delegation is made. This should be done in person.
 - It is always a good idea to follow up this meeting with a written memo outlining the key points of the discussion. You can do this yourself or request that your staff member do it.
- 2. Clearly describe the task, project, or function.**
 - Define the purpose of the assignment and how it fits into the big picture.
 - Review the scope of the employee's responsibilities.
 - Identify other personnel who will be involved, if applicable, and describe their roles.
 - Discuss feasible deadlines for completion.
 - Pass along any information needed to get started.
- 3. Establish agreed-upon standards of performance, measures of success, and levels of accountability.**
 - Set firm benchmarks for such things as quality, time, and cost.
 - Be clear with the employee about his accountability in meeting the standards you have agreed upon.
- 4. Define the resources and support that will be available.**
 - Identify any materials and physical resources needed to complete the assignment and confirm their availability.
 - If necessary, allocate additional staff to assist in meeting the assigned goals.
 - Ask the employee what support she thinks she may need from you throughout the assignment.
- 5. Identify the need for any special training or coaching and how it will be given.**
 - If the assignment requires the staff member to develop new skills, agree upon an appropriate plan for training.
 - Discuss the need for coaching and set up a schedule agreeable to both parties to provide the needed support.
 - Agree upon a date to review progress and assess the need for additional training or continued coaching.
- 6. Clearly define the level of authority being delegated.**

Be sure to clearly define the level of authority you are delegating and ensure that it meets the needs of the assignment. Depending on the employee's capabilities and your confidence in him or her, you may choose to allow the employee to do one of the following:

- Make and implement decisions as needed without prior consultation with you
- Make decisions as needed and notify you prior to any implementation
- Make recommendations for a final decision, which you must then approve
- Provide you with several alternatives from which you will make a final decision
- Provide you with relevant information from which you develop alternatives and then make a decision with input from the staff member

Take the initiative in communicating the authority you have delegated to other involved staff members. Consider your confidence in the staff member's abilities and the complexity of the task

or project involved in determining the level of authority to delegate.

7. Agree upon parameters for follow-up and feedback.

- Establish a system for reporting progress on a regular basis; for example, monthly reports, or weekly or monthly staff meetings.
- Agree upon parameters for providing ongoing feedback as needed. Your feedback will be seen as less intrusive if you and your staff member agree ahead of time on when and how you will provide it.
- Establish how and when you will become involved if the expected goals for the task, project, or function are at risk or if other major problems arise.

Tips for delegating effectively

- Recognize the capabilities of your staff.
- Trust your staff's ability to get the job done.
- Focus on results—let go of your need to have a say in how tasks are accomplished.
- Consider delegation as a way to develop the skills of your staff or to position people favorably with senior management.
- Always delegate to the lowest possible skill level required to make the best use of staff resources.
- Explain assignments clearly and provide resources needed for successful completion.
- Provide ongoing feedback to your staff and support them through their mistakes.
- Deflect reverse delegation—do not automatically solve problems or make decisions for your staff members. Focus on generating alternatives together.

Tips for choosing what to delegate

- Assess your own workload and identify those tasks, projects, or functions that require your specific set of skills and authority.
- Identify routine tasks, specific projects, or complete functions that could easily be done by other staff members or outside resources.
- Identify tasks, projects, or functions that could be done by others with a minimum of coaching or on-the-job training.
- Identify those tasks, projects, or functions that could be completed by a staff member if additional training or coaching were provided by yourself or one of their peers.
- Identify tasks, projects, or functions that may require expertise or skills from outside your department or organization.

Delegation skills checklist

<i>Delegation Skills Checklist</i>		
<i>Use this checklist to learn how well you delegate. Answer all the following questions.</i>		
Question	Yes	No
1. Do you spend most of your time completing tasks that require your specific level of skill and authority?		
2. Do you assign tasks to people at the lowest staff level capable of completing them successfully?		
3. Do you have trust and confidence in the ability of your staff members to complete job assignments successfully?		
4. Do your staff members know what you expect of them?		
5. Do you take the time to carefully select the right person for the right job?		
6. Do you clearly brief staff members on all aspects of an assignment when you delegate?		
7. Do you allow employees sufficient time to solve their own problems before interceding with advice?		
8. Do you use delegation as a way to help employees develop new skills and provide challenging work assignments?		
9. Do you focus on results achieved versus the methods used to achieve them?		
10. Do you provide staff members with the necessary authority needed to complete assigned tasks?		
11. Do you realize that mistakes may be made and are an important part of the learning process for your staff?		
12. Do you clearly outline expected results and hold your staff accountable for achieving these results?		
13. Do you support your staff with an appropriate level of feedback and follow-up?		
14. Do you feel comfortable sharing control with your staff?		
15. Do you recognize that, as the delegator, you retain the ultimate responsibility for the outcome of the delegated assignment?		
TOTALS		
<p><i>If you answer "yes" to at least twelve questions, you are doing a good job of delegating.</i></p> <p><i>If you answer "no" to three or more questions, you may want to enhance your delegation skills. For those questions which you answer "no" to, you may want to identify how to change the behavior and practice it the next time you delegate an assignment.</i></p>		

© 2004 Harvard Business School Publishing. All rights reserved.

Worksheet for preparing to delegate

<i>Worksheet for Preparing to Delegate</i>
<i>Use this worksheet to help you prepare for a delegating discussion with an employee.</i>
Assignment:
Assigned To:
Clearly define the project, task or function you are preparing to delegate.
What are the criteria for the assignment's success?
What is the timeline for completion?
Describe, in specific terms, the level of authority being delegated.
Describe your plan for follow-up to monitor progress.

© 2004 Harvard Business School Publishing. All rights reserved.

Delegation assignment tracking form

<i>Delegation Assignment Tracking Form</i>				
<i>Use this form to help you track the assignments you have delegated and monitor progress toward established goals.</i>				
Delegated Tasks	Assigned to	Date Assigned	Target Due Date	Completed on

© 2004 Harvard Business School Publishing. All rights reserved.

Task delegation analysis worksheet

Task Delegation Analysis Worksheet						
Once you have determined the tasks to delegate, use this form to help you plan each delegation and select the appropriate person for the job.						
Task to Delegate	Expected Results	Established Standards	Deadline	Skills Needed	Possible Personnel	Training Needed

© 2004 Harvard Business School Publishing. All rights reserved.

Why Develop Others?

“At the end of the day, you bet on people, not strategies.”

Larry Bossidy
Former CEO, AlliedSignal

In today’s global business environment, markets and regulations change quickly. Competitors constantly innovate. Technological changes are the norm.

In order to outmaneuver the competition and meet the demands of the moment, organizations must be agile. They must execute flawlessly. And they must transform themselves continuously.

Are your leaders ready?

Dr. Noel M. Tichy
Professor
University of Michigan Ross School of Business

We have now entered an era where I don’t care what industry you’re in, you need leaders who can make decisions, make judgment calls at every single level. All the way down to the interface with the customer.

If you go to a company like Google or any of the high tech companies, a lot of the innovation that Amazon does is happening right at the front line. Go ahead, try it, put it out there, we'll learn from it. That cannot happen if the senior leadership doesn't have a commitment to both develop the leadership capability, but develop the business through engaging people at all levels of the organization.

Becoming a teaching organization

I like to tell parents that they cannot delegate their responsibility to develop their children. And I think it is the same in an organization. Day in and day out the person that has the biggest impact on people in the organization is the next level above and the associates around and below. And so to build a learning organization I say is not enough. Learning could be, you know we are learning cooking, we are learning this or that, but teaching organizations, when I learned something, I have a responsibility to teach my colleagues.

So everybody takes responsibility for generating new knowledge and it is not enough to be a learner, you then have to translate it into teaching.

The Virtuous Teaching Cycle

The role of a leader is to ensure that the people who work for them and around them are better every day. There's only one way to make people better. It's to teach them, learn from them, create what I call "virtuous teaching cycles", not command and control.

A virtuous teaching cycle is teach learn, teach learn. And the leader has a responsibility for reducing the hierarchy, for having a point of view to start the discussion, but then to be responsible to hear everyone's voice, get everyone involved in a disciplined way. It is not a free for all. But it is the leader's responsibility to create that virtuous teaching cycle.

A wonderful example of virtuous teaching cycle is the program that Roger Enrico ran at Pepsi, where every one of the 10 vice presidents comes with a business project.

Roger Enrico gets smarter as result of five days with 10 vice presidents, because he's learning from them. He needs to lower the hierarchy. He needs to be open to learning. And in turn, the people participating need to be energized and empowered to come up and engage in problem solving.

Another example is at Best Buy, where every morning in the stores you would bring 20 associates or so together and they would review the profit and loss statement from the day before, what we learned from the different customer segments in our stores, what we can do to improve our performance this day. And they do that every single day. The store manager was learning mostly from the associates on the floor.

That was a virtuous teaching cycle were everybody is teaching everybody, everybody is learning and the result has been an incredible result at Best Buy.

"The growth and development of people is the highest calling of leadership."

- Harvey S. Firestone

Founder, Firestone Tire and Rubber Co

There are clear advantages to leader-led development.

But for many leaders, taking on teaching, coaching, and other development responsibilities can seem daunting. You might avoid taking on these roles due to lack of time, resources, or your own lack of comfort with this role.

The following tips and resources can help you impart valuable learning to your team every day.

To develop others...

- Start with a Teachable Point of View

The first requirement of being able to develop other leaders is to have what I call a teachable point of view. I often give the example of, if I ran a tennis camp and you just came to day one of the tennis camp, I better have a teachable point of view on how I teach tennis. So you are standing there looking at me and it has got four elements. One, the ideas, well how do I teach the backhand, the forehand, the serve, rules of tennis. Then if I am a good tennis coach, I have a set of values. What are the right behaviors I want, how do I want you to dress, how do I want you to behave on the tennis court.

But if that's all I have, what do I do? Show you a power point presentation and then expect you to hit 500 backhands, 500 serves, run around for eight hours. I have to have a teachable point of view on emotional energy. How do I motivate you to buy in to the ideas and values?

On one end of the spectrum it could be I threaten you with corporal punishment, the other I can give you stock options, I can make you feel good about yourself, I can help you develop as a human being, what motivates you.

And then finally, how do I make the tough judgment calls, the yes/no, decisions as the tennis coach, the ball is in, the ball is out. I don't hire consultants and set up a committee, it is yes/no. And the same with running a business, what are the products, services, distribution channels, customer segments that are going to grow top line growth and profitability of the organization.

What are the values that I want everyone in the organization to have, how do I emotionally energize thousands of people, and then how do I make the yes/no, judgments on people and on business issues. So the fundamental building block of being able to develop other leaders is to have that teachable point of view just like the tennis coach.

To develop others...

- Lead with questions

Questions are hugely important because you want to create dialogue and again, what I call a virtuous teaching cycle where the teacher learns from the students and vice versa. Which means everybody ought to be free to ask whatever is on their mind, whatever it will take to get clarity and understanding, but it is not the leader just coming in and freeform asking questions. I believe the leader has a responsibility for framing the discussion, for having as best they can a teachable point of view, they may need help from their people in flushing it out, but they need to set the stage but then it has to be a very interactive, what I call virtuous teaching cycle environment, teach learn, teach learn, teach learn.

To develop others...

- Make it part of your routine

A good example to me of an outstanding leader developing other leaders is Myrtle Potter who at the time I am commenting was Chief Operating Officer of Genentech running the commercial side of the business. And she would take time at the end of every single meeting and do some coaching of the whole team on how we could perform as a team better, and then she would often take individuals and say, could we spend 10 minutes over a cup of coffee, I want to give you some feedback and coaching on that report that you just presented on or how you are handling a particularly difficult human resource issue, but it was part of her regular routine. And I think the challenge for all of us as leaders is to make that a way of life and it is built into the

fabric of how we lead and it is not a one off event, three times a year. It is happening almost every day.

To develop others...

- Make it a priority

One of the biggest challenges in getting people kind of on this path is to overcome some of their own resistance, either fear or the way I view the world I don't have time for this, everybody can make time. Roger Enrico is CEO of Pepsi. He didn't have time to go off for a week at a time and run training sessions. He had to readjust his calendar. So it requires you to look in the mirror and say, is this important. If it is important, of course I can make the time. Then I have to get over my own anxiety on how well I can do it, but it is a commitment to get on the path that says: this is how I am going to drive my own performance and the performance of my colleagues.

To develop others...

- Learn to teach

I think the biggest mistake is to assume you are going to be good at it right off the bat. It is like learning anything else. First time you go out and try and play tennis, good luck. But you got to stay with it and you got to engage your people in helping make you better and them better. And so it is a journey you need to get on, not I am going to do it perfectly when I start out.

If you want to be a great leader who is a great teacher, it's very simple. You have got to dive into the deep end of the pool. But you've got to dive into the pool with preparation. I don't want you drowning. I want you succeeding. It is extraordinarily rewarding for most human beings to teach others. I think once you can turn that switch on, it is self perpetuating. You get a lot of reinforcement, your team is better. You perform better because your performance goes up and it becomes this virtuous teaching cycle.

Your opportunity to develop others

We've heard why developing others can drive greater business results, and how to make the most of your leader-led development efforts. The materials provided in Develop Others enable you to create personalized learning experiences for YOUR team within the flow of their daily activities. Use the guides and projects to engage your team quickly. And to explore how key concepts apply to them in the context of their priorities and goals.

The value of teaching is the performance of the organization is totally dependent on making your people smarter and more aligned every day as the world changes. In the 21st century we are not going to get by with command and control. We are going to have to get by with knowledge creation. The way you create knowledge in an organization is you create these virtuous teaching cycles where you are teaching and learning simultaneously, responding to customer demands and changes, responding to changes in the global environment. My bottom line is if you're not teaching, you're not leading.

A leader's most important role in any organization is making good judgments — well informed, wise decisions about people, strategy and crises that produce the desired outcomes. When a leader shows consistently good judgment, little else matters. When he or she shows poor judgment nothing else

matters. In addition to making their own good judgment calls, good leaders develop good judgment among their team members.

Dr. Noel M. Tichy**Professor, University of Michigan Ross School of Business**

Dr. Noel M. Tichy is Professor of Management and Organizations, and Director of the Global Business Partnership at the University of Michigan Ross School of Business. The Global Business Partnership links companies and students around the world to develop and engage business leaders to incorporate global citizenship activities, both environmental projects and human capital development, for those at the bottom of the pyramid. Previously, Noel was head of General Electric's Leadership Center at Crotonville, where he led the transformation to action learning at GE. Between 1985 and 1987, he was Manager of Management Education for GE where he directed its worldwide development efforts at Crotonville. He currently consults widely in both the private and public sectors. He is a senior partner in Action Learning Associates. Noel is author of numerous books and articles, including:

For more information about Noel Tichy, visit <http://www.noeltichy.com>.

Share an Idea

Leaders are in a unique position to recognize the ideas and tools that are most relevant and useful for their teams. If you only have a few minutes, consider sharing an idea or tool from this topic with your team or peers that is relevant and timely to their situation.

For example, consider sending one of the three recommended ideas or tools below to your team with your comments or questions on how the idea or tool can be of value to your organization. By simply sharing the item, you can easily engage others in important conversations and activities relevant to your goals and priorities.

[Steps for delegating to the right person](#)

[Tips for delegating effectively](#)

[Worksheet for preparing to delegate](#)

To share an idea, tip, step, or tool with your comments via e-mail, select the EMAIL link in the upper right corner of the page that contains the idea, tip, step, or tool that you wish to share.

Discussion 1: Overcoming obstacles to delegating

Delegation makes some managers uneasy. They fear losing control of staff and projects, and worry that they're "giving up" too much responsibility. Sometimes managers just believe that doing the job themselves will be most efficient. However, these fears and beliefs are rarely justified.

You and your team can make substantial contributions to your unit or department by improving your capacity to delegate projects effectively. Use these resources to lead a discussion with your team about understanding and overcoming obstacles that can prevent managers from delegating when they should.

Download resources:

[Discussion Invitation: Overcoming Obstacles to Delegating](#)

[Discussion Guide: Overcoming Obstacles to Delegating](#)

[Discussion Slides: Overcoming Obstacles to Delegating \(optional\)](#)

[Tips for Preparing for and Leading the Discussion](#)

The discussion you have with your team will help them improve their ability to delegate work when appropriate.

Working through the discussion guide can take up to 45 minutes. If you prefer a shorter 15- or 30-minute session, you may want to focus only on those concepts and activities most relevant to your situation.

Discussion 2: Managing delegated work successfully

One of the biggest challenges for your team members who are managers is to ensure that employees to whom they have delegated work carry out their assignments successfully. That requires that these managers clarify scope, monitor progress, and provide ongoing support throughout the course of the delegated assignment. Fortunately, there are a number of approaches that can help your team members manage delegated work without undermining their employees' ownership of delegated work.

Your team can make substantial contributions to your organization by improving their capacity to manage delegated assignments effectively. Use these resources to lead a discussion with your team about: (1) making the assignment; (2) monitoring a delegation; and (3) providing support.

Download resources:

[Discussion Invitation: Managing Delegated Work Successfully](#)

[Discussion Guide: Managing Delegated Work Successfully](#)

[Discussion Slides: Managing Delegated Work Successfully \(optional\)](#)

[Tips for Preparing for and Leading the Discussion](#)

The discussion you have with your team members will help them apply techniques for assigning, supporting and monitoring delegated tasks and projects.

Working through the discussion guide can take up to 45 minutes. If you prefer a shorter 15- or 30-minute session, you may want to focus only on those concepts and activities most relevant to your situation.

Start a Group Project

Just like any change effort, successfully incorporating new skills and behaviors into one's daily activities and habits takes time and effort. After reviewing or discussing the concepts in this topic, your direct reports will still need your support to fully apply new concepts and skills. They will need to overcome a variety of barriers including a lack of time, lack of confidence, and a fear of making mistakes. They will also need opportunities to hone their skills and break old habits. To help ensure their success, you can provide safe opportunities for individuals and your team as a whole to practice and experiment with new skills and behaviors on the job.

For example, to encourage the adoption of new norms, you can provide your team members with coaching, feedback, and additional time to complete tasks that require the use of new skills. Management approaches such as these will encourage team members to experiment with new skills until they become proficient.

Group learning projects provide another valuable technique for accelerating team members' development of new behaviors. A group learning project is an on-the-job activity aimed at providing team members with direct experience implementing their new knowledge and skills. Through a learning project, team members discover how new concepts work in the context of their situation, while simultaneously having a direct and tangible impact on the organization.

The documents below provide steps, tips, and a template for initiating a group learning project with your team, along with two project recommendations for this topic.

Download resources:

[Tips for Initiating and Supporting Learning Projects](#)

[Learning Project Plan Template](#)

[Learning Project: Preparing to Delegate](#)

[Learning Project: Debriefing Delegated Assignments](#)

How Can I Become Better at Delegating?

[Marshall Goldsmith. "How Can I Become Better at Delegating?" *Harvard Management Update*, December 2007.](#)

[Download file](#)

Summary

Delegation is one of those Management 101 skills that, like giving constructive feedback, can be surprisingly hard to master, writes executive coach Marshall Goldsmith in this "Management Quick Tip." Goldsmith asserts that the objective should be delegating more effectively rather than delegating more frequently, and provides steps to identify employees ready to handle the challenges of new tasks—tasks that you shouldn't be doing.

Are You Delegating So It Sticks?

[Lauren Keller Johnson. "Are You Delegating So It Sticks?" *Harvard Management Update*, September 2007.](#)

[Download file](#)

Summary

As a manager, you're well aware of the importance of developing subordinates, and that means delegating responsibilities to them that will hone their problem-solving and decision-making powers. But when pressure is building and the clock ticking, sometimes the better option seems to be tackling a challenge yourself rather than coaching an employee in doing it. Don't give in to this temptation; in the end, you'll cheat your employees and yourself. In this article, experts across a range of industries dispense tested advice for making delegation easier and more effective.

Is the Rookie Ready?

Sarah Green, Michael Schrage, Carol A. Walker, and Paul Muller. "Is the Rookie Ready?" *Harvard Business Review*, December 2009.

[Download file](#)

Summary

A week before Christmas, Tim O'Connell, a manager at Driscoll Software, gets a call from Hybara Casinos. The former client's system has crashed, and the company wants to be rescued by New Year's Day. The project will generate much-needed revenue, but it involves six weeks' worth of work crammed into two—and over the holidays, no less. Tim's star programmer, Alessandra Sandoval, quit several months earlier, and the rookie Kristen Hammersmith has taken her place. Should Tim contract the project out to Alessandra or trust Kristen to lead the team? Three experts comment in this fictional case study. Tim should hire Alessandra immediately, says Michael Schrage, a researcher at Sloan School of Management's Center for Digital Business. Kristen is in over her head. But more important, Tim is a shockingly poor manager. Carol A. Walker, the founder and principal of the consulting firm Prepared to Lead, agrees that Tim isn't doing his job and outlines a scenario whereby he demonstrates his confidence in, and support for, Kristen and prepares her to succeed. Paul Muller, Hewlett-Packard's vice president of strategic marketing for software products, says that in this severely condensed time frame, Driscoll and Hybara need to assess the risks and costs involved in rushing the project. If they decide to go ahead, Tim should empower Kristen to lead.

v 11.0.2.07272011 © 2011 Harvard Business School Publishing. All rights reserved.